

Firm Profile:

Traditional Investment Management Firm

Geography:

US

eVestment Client Since:

2001

Subscriptions:

eVestment Analytics, Omni Complete

LSV Asset Management (LSV) is a quantitative value equity manager providing active management for institutional investors.

LSV prides itself on keeping a small staff focused on its core competency, investment management.

The firm was interested in how eVestment could help to improve the efficiency of its operation.

James W. Owens, LSV Partner & Director of Client Portfolio Services, chose eVestment's solutions because "We have more tools at our disposal and we have not had to increase our staff size as we've grown. We can do more work with the same staff."

CASE STUDY

LSV Asset Management

Flexible Tool

LSV has been a client since 2001 and initially used eVestment for competitive analysis. "As more offerings became available and eVestment grew, we were kept well informed by our local eVestment representatives of ways that we could improve the efficiency of our operation," said Owens. LSV uses Analytics to look at competitors, better position themselves with prospects or clients and to do competitive analysis on fee structure and products. "Analytics is very flexible and offers us the ability to do things we would have just done without in the past. I can tell you we are far better off today with it as a tool," Owens said.

Time and Money Savings

LSV was interested to hear about how Omni could help with database population and was impressed with how the solution could streamline the data entry process and broaden the firm's reach. Owens said, "The Omni solution is a tremendous time and money saver. We use Omni to populate consultant databases on a quarterly basis. Now we have only one thing to update – the Omni platform, and eVestment does the rest."

Ease of Use

Owens said LSV found eVestment "very easy-to-use" and a "cost-effective solution." "eVestment offers a one-stop shop for all of our needs. The founders of the company know what investment managers and consultants need and they created a product that delivers those solutions all in one place. No need for five different vendors when eVestment can provide those solutions," he said. Owens also noted that the ease of navigating eVestment's product has not only made it simpler for their whole team to use, but also increased the value they get from the solution.



James W. Owens
Partner & Director of Client Portfolio Services

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Valuable Relationship

The client service team has also been "responsive," Owens said. "We have found that the team at eVestment are really good listeners. If we've ever had a query or requested a solution, they are always there to try and satisfy that need. In this world, a quick turnaround is important. When I've had a crunch-time need, my eVestment service team has come to the rescue. Responsive service and a helping hand has made the entire relationship more valuable." In conclusion, Owens said he would be "surprised" if a peer of his didn't use eVestment yet, and that he would "recommend it to them as a fantastic product."